Expiring a Pre-Approval

In order to close an encumbrance, the user can manually “expire” a fully approved pre-approval (PA) to release the funding. Examples of when a user may want to release funds:

- A travel is cancelled and no PA will be imported into an expense report.
- The total amount of the PA is not used for the expense report, and the rest of the funds will not be used for future reports.

1. Select the “Submitted Last 90 Days” in the PA section. Make sure to be logged into the correct owner’s dashboard.
2. The user should then pick the PA they wish to expire. (Note that the PA must be in an “Approved” status)
3. Select the “Expire” button to unencumber the remaining funds.

4. Select “Expire” again to confirm that the user wants to release the encumbrance and will not be able to use this PA in the future.
5. The PA has now gone from “Approved” to “Used/Expired” status.